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Justin Johnson, Secretary

MEMORANDUM

TO: Performance Accountability Liaisons and Business Managers
CC: Jim Reardon, Andy Pallito, and Budget Analysts
FROM: Susan Zeller, Chief Performance Officer
RE: FY 2017 Programmatic Performance Measures Budget Submission
DATE: September 25, 2015

On August 25, 2015, Secretary Johnson issued the FY 2017 Budget Instructions. Included was a general directive concerning Performance Measures (page 5 of the FY 2017 Budget Instructions or page 2 of this memo) stating that I would subsequently send out template information.

Attached, please find two documents: 1) the FY 2017 Budget Performance Measure Template; and 2) Performance Measure Budget Instructions & Example. Please review the Instruction and Example document before attempting to use the excel template. You will complete the template by filling-in the **yellow highlighted cells** and by selecting from several drop-down menus. A separate file must be completed for each Program you provide appropriation and Performance Measure data on. Save and rename the excel template submission with a file name indicating your agency/department and program name/number. For example, the Department of Human Resources might name their excel file submission for the Employee Wellness Program: DHR_EE_Well.xlsx, or DHR_Prog_XXXXX.xlsx. Whatever works for you, will work for me.

Initial Programmatic Performance Measure submission(s) are **due by December 1, 2015**. This will allow sufficient time to vet the wording and performance measure selections. Submissions should be emailed to: ADM.Budget@Vermont.gov on or before December 1, 2015.

You may need to revise your Performance Measure submission(s) when final targets are received by your Business Office, if they impact your Program appropriation(s). The current timeline for Finance & Management to send out final FY 2017 budget targets is “mid-December.” Even though we are not entering the Program Performance Measure data into the Vantage System this year, the appropriation amounts for the Programmatic Performance Measures submission(s) must agree with the final appropriation submissions in the Vantage System. Please work collaboratively – PALs, Business Office staff and Budget Analyst - to ensure final tie-in.

I will, of course, notify you when final targets have been sent. Once you have determined if adjustments are required, please submit your final completed Performance Measure form(s) to: ADM.Budget@Vermont.gov no later than Wednesday, January 6, 2016, to allow time for verification and consolidation of the report to the Legislature.

Don't hesitate to call or email me (802-828-6448 or susan.zeller@vermont.gov) with questions, or if I can assist you in determining your program(s) and performance measures selections.

Extract From Page 5 of the FY 2017 Budget Instructions:**Performance Measures**

Previously, departments were expected to present, to the appropriation committees, summary information related to their strategic overview, program profile, and performance information, as required under 32 V.S.A. §307(c). This statutory section was revised in 2015 Act 11 Sec. 33. Due to the revision, the formerly used “Attachment A” and the methodology previously used for disclosing programmatic performance are no longer valid. Instead, programmatic performance shall be reported using the framework of 2014 Act 186 – Population-Level Outcomes, Indicators and Performance Measures. Many of you may recognize this methodology as “Results-Based Accountability” or “RBA.”

- 1. Departments that reported performance measure data in the Vantage Performance Management module last year:** For FY 2017, you will report the same program(s) and measures reported last year, **plus**, at least one additional program. All programs submitted must include the basic elements of RBA: Outcome (“Result or Objective”); Indicator (a condition of well-being – if applicable); and at least three (3) Performance Measures of any type (How much did we do? How well did we do it? Is anyone better off?), **plus** the total budget dollars for the program must be included (see separate instructions, example and template, Attachment B). Each program must use a separate template. **You no longer need to do any of the traditional reporting.**
- 2. For departments who only reported programs and measures in the traditional way last year and not in the Vantage System:** You may continue to use program(s) you previously reported in prior year, or select others, as long as you provide the information and data using “RBA” framework. Each such agency and department is expected to report at least one program in accordance with 2014 Act 186.
- 3. How to Report:** Our use of the Vantage performance measure module the last two budget cycles proved to be cumbersome and difficult. **We have decided not to use the module this year. You will be reporting using a new Excel template that will distributed to your department via the Chief Performance Office.** Template information will be submitted to, and consolidated by the Chief Performance Officer “outside” of the Vantage System. Hopefully, this will eliminate the conflicts seen last year when last minute update needs of the business office staff conflicted with those for the performance management staff.

Attachments (2)